

WISP CLIENTPOINT FOR THE SALVATION ARMY

1. Put in the FIRST & LAST NAMES of the CLIENT

(Note: Do not fill in any other data element.)

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

Add as New / Search for Existing Client

Last Profile: -Select-

First *: Make MI Last *: Believe Suffix:

SS#: - - -

SSN Data Quality: -Select-

Date of Birth: (mm/dd/yyyy)

Gender: - Select -

Race: - Select -

Search Filter: ☐ Exact Match?

Add / Find Client **Add As Anonymous Client**

* - Searchable Field

2. Click Add/ FindClient

3. Check to see if there are any matching clients in POSSIBLE MATCHES.

If NO MATCHING CLIENT,

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Possible Matches (refine your results or add as new below)

Name	SS#	Date of Birth	Gender	Banned
No matching Clients found.				

showing 0-0 of 0

Then Click “ADD CLIENT WITH THIS INFORMATION”

Search Filter: ☐ Exact Match?

Refine Search Criteria: **Add Client With This Information**

* - Searchable Field

AND

Microsoft Internet Explorer

About to add this client as New. (Be sure to look through all the possible matches before continuing this process.) Continue with Add New Client?

OK Cancel

If THERE IS A MATCHING CLIENT,

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Possible Matches (refine your results or add as new below)

Name	SS#	Date of Birth	Gender	Banned
* Believe, Make				

showing 1-1 of 1

CLICK ON THE NAME OF THE CLIENT

4. You will automatically go to the PROFILE PAGE of CLIENTPOINT, where you should answer all of the SALVATION ARMY ASSESSMENT questions.

ServicePoint™ WI Department of Commerce, Bureau of Housing Aug 10, 2005
WI Department of Commerce / Madison

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Profile Assessments Case Plans Service Transactions

Client - Believe, Make (#4049)
Release of Info: None

ENTRY/EXIT ROI RESOURCE PT CASE WORKERS SECURITY

Client Profile

Added to System Aug 10 2005 02:54PM

First MI ☐ Last Suffix

SS# - -

SSN Data Quality

Age

HUD Universal Data Elements

Save Changes

Assessment Date : PM

Items in red are HUD universal data elements.

Date of Birth 2.3 (mm/dd/yyyy) H G

Ethnicity 2.4.1 H G

Race H G

Secondary Race (if provided) H G

Gender H G

Is Client U.S. Military Veteran? H G

Do you have a disability of long duration? 2.7 H G

Below indicate where the client spent the night prior to entering your program.

Type of Living Situation 2.8 H G

Length of Stay H G

Zip Code of Last Permanent Address 2.9 H G

Zip data quality H G

HUD Universal Data Elements

Save Changes

5. Click "SAVE CHANGES"

NOTE:

- If the CLIENT is SINGLE, GO TO RELEVANT SERVICE RECORD.
- If the CLIENT is in a HOUSEHOLD, CREATE HOUSEHOLD (follow steps below)

6. CLICK “ADD THIS CLIENT TO HOUSEHOLD”

Households Containing Make Believe

Household Type	Clients in Household	Relationship	Date Entered	Date Removed	Head of Household
No Households found for this client.					

Add this client to Household

7. Answer the question about who the CLIENT in the HOUSEHOLD, the Click “START NEW HOUSEHOLD”

Add Client to Household - (Make Believe)

Household Type (if starting new household) Single Parent

Head of Household Yes

Relationship to Head of Household: mother

Date Entered 08/10/2005 (mm/dd/yyyy)

Date Removed (mm/dd/yyyy)

Start NEW Household Add to EXISTING Household Cancel

8. Put in the FIRST & LAST NAMES of the HOUSEHOLD MEMBER

(Note: Do not fill in any other data element.)

Add Clients To Household - (Make Believe)

Overview - Type: Single Parent, # Clients: 1 Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
Believe, Make	mother	08/10/2005		Yes

Add Additional Clients to Household

First * Ida MI Last * Believe Suffix

SS# * - -

SSN Data Quality -Select-

Date of Birth

9. Click Add/ FindClient

Search Filter ☐ Exact Match?

Add / Find Client Add As Anonymous Client

* - Searchable Field

10. Check to see if there are any matching clients in POSSIBLE MATCHES.

If NO MATCHING CLIENT,

The screenshot shows a window titled "Add Clients To Household - (Make Believe)". It has an "Overview" section with "Type: Single Parent, # Clients: 1" and an "Edit Household Type" button. Below is a table with columns: Name, Relationship, Date Entered, Date Removed, and Head of Household. The first row shows "Believe, Make" as the mother, entered on 08/10/2005, and is the head of household. Below this is a "Possible Matches" section with the instruction "(refine your results or add as new below)". It contains a table with columns: Name, SS#, Date of Birth, and Gender. The text "No matching Clients found." is displayed in the table area. At the bottom right, it says "showing 0-0 of 0".

Then Click “ADD CLIENT WITH THIS INFORMATION”

This screenshot shows the search filter options. There is a "Search Filter" section with an "Exact Match?" checkbox. Below it is a "Refine Search Criteria" section with two buttons: "Refine Search Criteria" and "Add Client With This Information". The "Add Client With This Information" button is circled. At the bottom left, it says "* - Searchable Field".

AND

This screenshot shows a Microsoft Internet Explorer dialog box with a question mark icon. The text inside says: "About to add this client as New. (Be sure to look through all the possible matches before continuing this process.) Continue with Add New Client?". There are "OK" and "Cancel" buttons at the bottom. The "OK" button is circled.

If THERE IS A MATCHING CLIENT,

This screenshot shows the same "Add Clients To Household - (Make Believe)" window as before. In the "Possible Matches" section, the table now shows one match: "Believe, Ida" with a red asterisk next to the name. The text "showing 1-1 of 1" is at the bottom right.

CLICK ON THE NAME OF THE CLIENT

11. Fill Out “CONTINUE ADDING THE HOUSEHOLD MEMBER”

This screenshot shows the "Continue Adding Household Member" form. It has fields for: Client (Believe, Ida), Head of Household (No), Relationship to Head of Household (daughter), Date Entered (08/10/2005), and Date Removed (empty). At the bottom, there are "Add Household Member" and "Cancel" buttons. The "Add Household Member" button is circled.

12. Click “ADD HOUSEHOLD MEMBER”

NOTE

- If the **HOUSEHOLD IS COMPLETE** , then (follow steps below)
- If there are **MORE CLIENTS IN HOUSEHOLD**, then “**ADD ADDITIONAL CLIENTS TO HOUSEHOLD** by repeating Steps 8 -12 until Household is complete.

Add Clients To Household - (Make Believe)

Overview - Type: Single Parent, # Clients: 2 Edit Household Type

	Name	Relationship	Date Entered	Date Removed	Head of Household
	Believe, Ida	daughter	08/10/2005		No
	Believe, Make	mother	08/10/2005		Yes

Add Additional Clients to Household

NOTE: For every individual entered into the hold complete Steps 13 - 17

13. Put in the FIRST & LAST NAMES of the CLIENT

(Note: Do not fill in any other data element.)

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

Add as New / Search for Existing Client

Last Profile: -Select-

First *: Make MI: ☐ Last *: Believe Suffix:

SS#: - - -

SSN Data Quality: -Select-

Date of Birth: (mm/dd/yyyy)

Gender: - Select -

Race: - Select -

Search Filter ☐ Exact Match?

Add / Find Client Add As Anonymous Client

* - Searchable Field

14. Click Add/ Find Client

15. LOOK FOR CLIENT in POSSIBLE MATCHES – (note: if it is not here you made a mistake).

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

Possible Matches (refine your results or add as new below)

	Name	SS#	Date of Birth	Gender	Banned
*	Believe, Make				

showing 1-1 of 1

CLICK ON THE NAME OF THE CLIENT

16. You will automatically go to the PROFILE PAGE of CLIENTPOINT, where you should answer all of the SALVATION ARMY ASSESSMENT QUESTIONS.

ServicePoint™ WI Department of Commerce, Bureau of Housing Aug 10, 2005
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Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

Profile Assessments Case Plans Service Transactions

Client - Believe, Make (#4049)
Release of Info: **None**

Client Profile [Save Changes] [Exit]

Added to System Aug 10 2005 02:54PM

First MI ☐ Last Suffix

SS# - -

SSN Data Quality

HUD Universal Data Elements [Save Changes]

Assessment Date : [Back Date]

Items in red are HUD universal data elements.

Date of Birth 2.3 (mm/dd/yyyy) H G

Ethnicity 2.4.1 H G

Race H G

Secondary Race (if provided) H G

Gender H

Is Client U.S. Military Veteran? H

Do you have a disability of long duration? 2.7 H G

Below indicate where the client spent the night prior to entering your program.

Type of Living Situation 2.8 H G

Length of Stay H G

Zip Code of Last Permanent Address 2.9 H G

Zip data quality H G

HUD Universal Data Elements [Save Changes]

17. Click "SAVE CHANGES"

NOTE: For every CLIENT IN THE HOUSEHOLD, the SALVATION ARMY ASSESSMENT should be COMPLETED. When all assessments are completed for everyone in the household, go to the relevant record of service.